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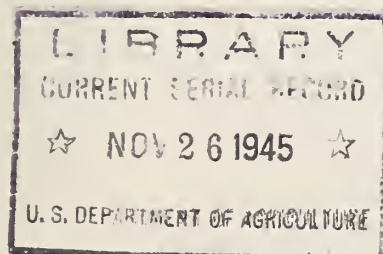
# Foreign Crops and MARKETS



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## WORLD RAISIN PRODUCTION LOWER

The preliminary estimate for 1944 raisin production in the principal foreign producing countries other than Greece <sup>1/</sup> is 181,900 tons compared with 216,100 tons in 1943 and 183,100 tons in 1942. The production shows only a 2-percent decline from the 5-year (1938-1942) average of 186,100 tons, and a 1-percent decline from the 10-year (1933-1942) average of 183,000 tons. Declines in production were reported for Iran, South Africa, and Turkey. Australia reported an increase, while Spain maintained the 1943 production.

RAISINS: Production in specified countries, 1944 with comparisons

YEAR	AUSTRALIA	GREECE	IRAN	SOUTH AFRICA	SPAIN	TURKEY	FOREIGN TOTAL	UNITED STATES
	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons	Short tons
Average -	tons	tons	tons	tons	tons	tons	tons	tons
1938-1942 ..	72,700	-	34,500	11,100	9,500	58,300	a/186,100	233,800
1933-1942 ..	65,800	-	33,600	9,800	12,500	61,300	a/183,000	216,700
Annual -								
1940 .....	79,300	25,300	38,000	11,100	9,400	33,000	196,100	171,000
1941 .....	70,300	b/	33,000	10,000	6,600	40,700	a/160,600	209,000
1942 .....	79,900	b/	27,500	12,500	8,200	55,000	a/183,100	254,000
1943 .....	77,700	b/	38,500	12,500	10,400	77,000	a/216,100	401,000
1944 c/ ...	86,000	b/	33,000	11,700	10,400	51,000	a/192,100	274,000

Compiled from official sources.

a/ Does not include Greece. b/ Not available. c/ Preliminary estimate.

Growing conditions were less favorable in Iran and Turkey, but generally normal in the other countries. Harvesting was carried out under satisfactory weather conditions in all countries except Turkey, where some rain damage was reported. The supply of labor to take care of harvest was ample in all countries. Domestic transportation continued to be a problem in most countries, due to the lack of draft animals, gasoline, tires, and trucks.

The quality of this year's raisins was good in Australia, Spain, and South Africa, and average in Iran. The Turkish raisins are of smaller size than normal, and 20 percent of the crop was damaged by rains during the drying period. The remaining 80 percent varies in quality from satisfactory to good.

Carry-over stocks in producing countries as the new crop came to market were considerably smaller than for the corresponding date in pre-war years. Wartime restrictions prohibit the publication of figures for Australia and South Africa. In Iran, some 6,600 tons were still available on September 1 but were expected to <sup>1/</sup> See page 11.

be disposed of before new-crop raisins appeared in volume. The Spanish crop was virtually cleaned out of exportable qualities. No quantitative data on the carry-over in Turkey are available, but it is known that they are smaller than anticipated earlier in the year.

The marketing outlook for the season is somewhat obscured by the changed political situation in Europe and the Mediterranean areas. The removal of Germany and countries still under German control as buyers has closed the principal export outlets for some of the producing countries. Some of the remaining European nations that normally entered the Spanish, Greek, and Turkish markets are not in a position to do so at this time.

The largest remaining potential buyer of the available exportable surplus in Spain and Turkey is the United Kingdom, which country appears hesitant to purchase at present price levels. This hesitancy no doubt is due in part to the large amount of raisins available from Empire sources. In all non-British countries exporters report that inquiries from foreign countries



so far have been disappointing. Iran reports some interest by the Soviet Union and a few small-lot inquiries from Near East countries. Indications are that unless the United Kingdom and liberated areas make substantial purchases in the next few months a considerable portion of the 1944 crop will be carried over into the next season, even though production in countries not under enemy control is 54,000 tons less than in 1943.

### Australian Crop Largest On Record

The 1944 Australian crop of Sultanas and Lexias combined was the largest on record, being estimated at 74,600 short tons of the former and 11,400 tons of the latter. These data may be compared with 66,400 tons of Sultanas and 11,300 tons of Lexias in 1943 and 69,900 tons of Sultanas and 10,000 tons of Lexias for 1942. The production of Sultanas exceeded the 5-year (1938-1942) average of 62,800 tons by 19 percent and Lexias exceeded the 5-year (1938-1942) average of 9,900 tons by 15 percent.

Production of raisins in Australia during the 20-year period since 1924 has shown an upward tendency. This trend is expected to continue in the years ahead. The large production of 1944 was due to very favorable growing conditions and a larger-than-normal diversion from table and distillery uses. The quality of the crop was reported as being good.

Domestic civilian consumption of raisins and currants was larger in 1944 than in 1943, totaling approximately 22,000 tons. The remainder was used to supply the armed forces and for overseas shipment. Due to wartime restrictions, it is not possible to disseminate the export data. The continued increase in production in post-war years will no doubt find its market in the United Kingdom and other British Empire countries, thereby crowding out raisins from other producing countries such as the United States, Spain, Greece, and Turkey.

### South African Production Lower

The 1944 South African raisin production declined 6 percent from that of the

preceding year. The preliminary estimate is 11,700 short tons as compared with 12,500 tons in 1943 and 1942. Raisin production in the Union has shown a steady long-term tendency of increased production during the past 20 years. A comparison of the 5-year average for 1933-1937 of 8,800 tons with the 1938-1942 average of 11,100 tons demonstrates the trend. This year's estimate is 17 percent larger than the 10-year (1933-1942) average of 10,000 tons.

The Cape raisin production is normally disposed of in the domestic market, and by exports to the United Kingdom and to other African colonies. Shipments occasionally are made to Canada and India, depending on supplies and market conditions.

### Iran Production Somewhat Lower

The preliminary estimate for Iranian raisin production is 33,000 short tons as compared with 38,500 tons in 1943 and 27,500 tons in 1942. The estimate is 4 percent lower than the 5-year (1938-1942) average of 34,500 tons but only 2 percent below the 10-year (1933-1942) average of 33,600 tons.

Growing conditions this season were not as favorable as during the preceding one. Lack of rain during early winter months and late hail storms during the spring months damaged the vines. Harvesting took place under favorable conditions, and sufficient labor was available to handle the crop. The quality of the raisins is average.

September 1 carry-over stocks were estimated at 6,600 short tons. These were expected to be pretty well cleaned up in domestic channels before new-crop raisins began to appear in volume in the local markets. Domestic consumption has been abnormally high in recent years, due to the fact that large quantities are being used in rural areas to replace sugar. Another reason for the high consumption is that local distilleries are using large quantities to produce spirits for Allied troops in Iran. Domestic consumption now is estimated at 80 to 90 percent of production.

Exports of raisins during the war years have been considerably below average. Germany and Central European countries, which

formerly figured heavily in the export trade, are now out of the market. The Soviet Union and Near East countries have taken most of the wartime exports thus far and probably will do so again during the present marketing season. As the season opened this year only a few foreign inquiries had been received. The prices in relation to those in other raisin-producing countries are a little lower, being quoted at from 17 to 20 cents per pound, depending on quality. While Iranian raisin prices have shown a declining tendency for some months, trade sources expect a firmer market if foreign demand improves.

### Spanish Production Same As Last Year

The preliminary estimate of Spanish raisin production is 10,400 short tons. This is the same as the 1943 output but somewhat larger than the estimated production of 8,200 tons in 1942 and 9 percent larger than the 5-year (1938-1942) average of 9,500 tons. It is 17 percent smaller, however, than the 10-year (1933-1942) average of 12,500 tons. The estimate for the Malaga district is 4,400 tons as compared with 3,800 tons last year, representing a 16-percent increase and equivalent to the 5-year (1938-1942) average for that district. In the Valencia district the estimate is 6,000 tons, which is slightly lower than the 6,600 tons of last year, though it is 18 percent larger than the average of 5,100 tons for 1938-1942.

Indications are that producers are gradually overcoming the difficulties experienced during the years immediately following the close of the civil war and that annual production at least equivalent to the 10-year average is to be anticipated in the future, barring unusual weather and disease damage.

Icy winds during February and March in the Malaga district did no appreciable harm to vines, and, in general, growing conditions were good. There was relatively little disease damage in this district. Drying weather also was good, and the growers report a good-quality raisin. In Valencia both growing and drying weather were good, and the fruit is of good quality.

As new-crop raisins came to market it was estimated that 200 tons of the 1943 Malaga production and 600 tons of Valencias remained as carry-over. These 800 tons were of very inferior quality and were expected to be sold to distillers.

Consumption of last year's production was largely in domestic channels. Exports from Malaga consisted of Muscatels sent to Sweden on a barter deal late in the season. Efforts were made to interest the British, but they refused to buy at the prices then prevailing. The Valencia district likewise did little exporting during the 1943-44 marketing season. A few small lots were shipped successfully to Switzerland and the Spanish colonies. It was reported that 330 tons of Valencia raisins were still at the frontier awaiting shipment to Switzerland.

The market on October 1 in both Malaga and Valencia was rather dull, with prospects for only a slight improvement for the remainder of the season unless prices are substantially lowered. Large crops in Australia, Turkey, and other producing countries, plus the lack of adequate shipping, are expected to act as a deterrent to exports. It is likely that the domestic market will again absorb most of the production in both districts. The hope was expressed, however, that Sweden, Switzerland, and the United Kingdom would enter the market for the Christmas trade.

### Turkish Crop Smaller

The 1944 preliminary estimate of raisin production in Turkey is 51,000 short tons compared with 77,000 tons in 1943 and 55,000 tons in 1942. This represents a 13-percent drop from the 5-year (1938-1942) average of 58,300 tons and a 17-percent drop from the 10-year (1933-1942) average of 61,300 tons.

Growing conditions in the Izmir area were less satisfactory in general than last year. A shortage of rain in some sections early in the summer caused under development of the fresh grapes, which resulted in a smaller raisin than normal. Rains in August were reported to have damaged the quality of about 20 percent of the crop. The quality



of the remaining 80 percent is said to vary between generally satisfactory and good.

The marketing of this year's crop is a problem of great concern to the Turkish Government. Germany, for some years the largest buyer of Turkish raisins, and the various countries still under German control are now definitely out of the market. The German business was done on a compensation basis, which resulted in slightly higher prices than free markets would tolerate. The result of cutting off the German purchases is a lowering of prices and a difficult task of finding other outlets. The war has also removed for all practical purposes a number of other former buyers from the export market. The United Kingdom, normally a large buyer of raisins, seems

reluctant to negotiate at existing price levels.

The Izmir market formally opened on September 14, but by the end of September only about 1,200 short tons had been sold. Normally the volume of sales at that date would have been several times that amount. During the first 2 weeks the principal purchasers were the Government Monopoly and the Cooperative Association. A few small deals were closed by exporters for shipment to Egypt, Palestine, and Syria. The minimum local price fixed by the Ministry of Commerce for Type 9, average quality, was about 10 cents per pound, other grades varying between 7.6 cents and 13.2 cents. The comparative price for Type 9 last year was 18.5 cents.

W. R. Schreiber

### SOUTHERN RHODESIA'S TOBACCO CROPS BELOW AVERAGE IN VOLUME AND QUALITY

The 1943-44 crops of flue-cured and fire-cured tobacco in Southern Rhodesia totaled about 30.6 and 0.7 million pounds, respectively, and were generally of low quality. Export demand for the leaf, with the exception of active buying on the part of the Union of South Africa, was not as heavy as in recent years. Prices at auction sales held from April 12 through August 11, 1944, averaged 36.1 cents per pound for flue-cured leaf, as compared with 29.9 cents for 1942-43 crop flue-cured, and prices for fire-cured averaged only 12.5 cents compared with 21.3 cents for the previous crop. The decline in prices for fire-cured is attributed to poor quality and lowered demand for pipe tobacco by the United Kingdom.

The quality of both flue-cured and fire-cured leaf from the 1943-44 crops was low, as a result of excessive rainfall during the growing season. Part of the tobacco was over-conditioned when placed on the auction floors. The bulk of the better quality flue-cured leaf was purchased by the Union of South Africa, and most of the average and low grades were bought for export to other countries. Purchases for domestic use were largely confined to low grades and quantities that had been poorly graded and packed. The Union bought 11.1 million pounds of flue-cured at an average price of 47.3 cents per pound. Sales for other export markets, principally the United Kingdom, totaled 17.7 million pounds at an average price of 30.7 cents. The local market absorbed the balance, 1.6 million pounds, at a price of 18.2 cents. The market was supported by the strong demand and high prices paid by the Union of South Africa.

Fire-cured sales at the auctions totaled 0.7 million pounds at an average price

of 12.5 cents per pound. Low demand for pipe tobacco in the United Kingdom was reflected in the low average price.

#### SOUTHERN RHODESIA: Tobacco sales at auctions, April 12-August 11, 1944

	: FLUE-CURED :		: FIRE-CURED :	
	: AVERAGE:		: AVERAGE:	
DISPOSITION:	QUAN-	PRICE	QUAN-	PRICE
	TITY :	PER :	TITY :	PER :
	: POUND :		: POUND :	
	: Million:		: Million:	
Union of	: pounds:	Cents :	pounds:	Cents
S. Africa .:	11.1:	47.3 :	- :	-
Other export:	17.7:	30.7 :	0.3:	16.5
Domestic ...:	1.6:	18.2 :	0.4:	8.7
Total ....:	30.4:	36.1 :	0.7:	12.5

Official sources.

a/ About 0.2 million pounds additional were sold, but not on the auction floors.

Production of flue-cured and fire-cured types in Southern Rhodesia during the crop years 1936-37 through 1940-41 averaged about

28.2 million pounds. In 1941-42, a record production of these types amounting to 47.5 million pounds was harvested, but in 1942-43, shortages of labor and fertilizers reduced plantings, and production was only 31.3 million pounds.

Tobacco growers and Government agencies in Southern Rhodesia are reported to be making plans for an expanded tobacco production as soon as conditions permit. Some optimistic individuals forecast an increase in production of 100 to 200 percent and exports of 100 to 150 million pounds.

Leaf exports from the country, largely flue-cured, have nearly doubled in recent years. Record exports amounting to about 42.0 million pounds were unofficially reported for the 12-month period April 1941-March 1942. In 1940-41, exports totaled about 30.2 million pounds, and average exports during the 5 years 1935-36 through 1939-40 were 19.0 million pounds. The principal export market is the United Kingdom. During recent years it has taken about 75 percent of all leaf exports.

Based on Annual Report of  
Southern Rhodesian Tobacco Marketing Board

### CANADA PLANS OILSEED ACREAGE INCREASE IN 1945

Canadian oilseed objectives for 1945 call for an acreage expansion in all crops. While the flaxseed goal was not decided upon at the Dominion Provincial Conference, held in Ottawa, December 4 to 6, 1944, farmers will be urged to extend their 1945 sowings. Producers will be asked to enlarge their soybean, rapeseed, and sunflower-seed acreage by 10, 75, and 45 percent respectively. An increase in flaxseed production is being urged in order to meet the anticipated foreign demand in 1945-46. This may not be achieved unless a greater inducement is offered than the present fixed price of \$2.75 per bushel. In the absence of some further price consideration, the flaxseed acreage in 1945 is more likely to be smaller than that of 1944, when only 1.3 million acres were planted, although the goal called for 2.8 million.

#### CANADA: Production of specified oilseeds, by Provinces, 1944 with comparisons

CROP AND YEAR	SASKATCH- EWAN	MANITOBA	ALBERTA	ONTARIO	BRITISH COLUMBIA	QUEBEC	TOTAL CANADA
	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels	1,000 bushels
<b>FLAXSEED</b>							
1938 .....	725	300	160	44	3	27	1,259
1939 .....	1,250	425	275	58	4	32	2,044
1940 .....	1,650	800	425	170	4	-	3,049
1941 .....	3,718	1,145	778	113	34	-	5,788
1942 .....	10,500	2,000	2,200	262	30	-	14,992
1943 .....	11,500	2,800	3,300	235	76	-	17,911
1944 a/ .....	6,400	1,762	1,243	238	25	-	b/ 9,668
<b>SOYBEANS</b>							
Average -							
1938-1942 .....	c/	c/	c/	c/	c/	c/	359
1943 .....	-	20	-	545	4	-	d/ 569
1944 a/ .....	-	5	-	677	-	-	682
	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds	1,000 pounds
<b>SUNFLOWER SEED</b>							
1943 e/ .....	2,432	2,776	95	-	-	-	d/ 5,303
1944 a/ .....	2,850	5,650	-	-	-	-	8,500
<b>RAPESEED</b>							
1943 e/ .....	1,028	1,200	15	575	-	5	d/ 2,823
1944 a/ .....	1,920	4,200	90	390	-	-	6,600

Compiled from official sources. a/ Subject to revision. b/ Second estimate. c/ Production by Provinces not available. d/ Revised. e/ First year reported.



This year's flaxseed production, at 9.7 million bushels, was 46 percent below that of 1943. This was due primarily to the acreage reduction, which, in turn, was brought about by the more favorable incentives to grow wheat. The minimum price for wheat was raised from \$0.90 to \$1.25 per bushel whereas the fixed price for No. 1 flaxseed was raised only from \$2.50 to \$2.75 per bushel. Moreover, through participation certificates, wheat growers could anticipate something in addition to the \$1.25 for wheat. The long-time average yield for wheat is 16 bushels per acre, while the flaxseed yield is only 8 bushels. In addition Canadian farmers have a decided preference for growing wheat.

The 1944 soybean production was estimated at 682,000 bushels compared with 569,000 a year earlier. The acreage goal for 1945 is 40,000 acres, a 10-percent increase over the area planted in 1943. This may be difficult to achieve, since white beans, sugar beets, and corn are also grown in the same area. During the calendar year

1943, imports of soybeans amounted to 93,600 bushels, while 280,000 bushels were imported in the first 10 months of 1944. In addition, Canada imported 14.5 million pounds of soybean oil in 1943 and 3.9 million pounds during January-October 1944.

Commercial production of sunflower seed began in 1943, when 5.3 million pounds were produced from 12,370 acres. In 1944 the acreage was increased to 17,300 acres and production to 8.5 million pounds. Approximately 85 percent of the seeds from both crops were crushed for oil.

Rapeseed production on a commercial scale also began in 1943, when the yield was 2.8 million pounds from 4,000 acres. In 1944 production amounted to 6.6 million pounds from 12,000 acres. As a result of dry weather in western Canada, the yield per acre was smaller than that of 1943, and much of the seeded acreage was abandoned. The Canadian Wheat Board has been empowered to purchase rapeseed from the 1944 crop at 6 cents per pound, with discounts for excess moisture content and admixtures of mustard.

R. H. Boyle

## LATE COMMODITY DEVELOPMENTS

### GRAINS, GRAIN PRODUCTS, AND FEEDS

#### BOLIVIA CONTROLS FLOUR IMPORTS AND SALES

The importation and sale of flour in Bolivia were placed under Government control, by the provisions of a decree issued in October 1944. The purpose of the measure was announced to be the control of prices and the assurance of the equitable distribution of flour, the present supply of flour being insufficient to meet the demand.

Under the terms of the decree the sale price of imported flour will be fixed. All flour milled from domestic wheat will be taken over for distribution by the Ministry of Economy. Importers of flour will be required to obtain permits before importing, and sales can be made only upon authorization by the controlling body.

#### TUNISIA REPORTS REDUCED GRAIN CROPS

Grain crops in Tunisia were below average in 1944 and also below domestic needs,

according to reports received in the Office of Foreign Agricultural Relations. The wheat crop was estimated at 6,911,000 bushels. At that figure the production is less than the small crop reported for 1943 and would be the smallest crop since 1924. Although there is an exportable surplus in normal years, grain imports will be required to make up the current deficit.

Compared with the 1943 outturn, the entire wheat reduction is indicated to be in the soft (bread) wheat crop, since durum is estimated at a slightly larger figure than in 1943. The current durum crop is about 60 percent of the average for the 10 years ended with 1939, and soft wheat is only about 30 percent of production during that period.

The barley crop, placed at 5,149,000 bushels, is also considerably below average. The small outturns of both barley and wheat are due mainly to reduced yields, since acreage reductions were not in proportion to the decreased crops.

The grain shortage is causing some anxiety, according to reports. Bread is

rationed at the rate of 250 grams (9 ounces) daily.

### INDIAN RICE ACREAGE SHOWS INCREASE

The 1944-45 rice area now being harvested in India has just been officially estimated by the first Indian forecast at 73,475,000 acres, an increase of about 1.5 percent compared with the revised estimate for the corresponding period in 1943-44. This increase is of considerable importance, not only because rice is the principal item in the diet of a large part of the Indian population, but also because of the disappearance of the Far Eastern import markets as a supplementary source of supply.

No estimate for rice production in the 1944-45 season has been made as yet. While weather conditions were reported as being not too favorable in some areas, the condition of the crop as a whole was said to be fairly good. Normally the Indian rice acreage yields an average of approximately 25 bushels to the acre. The present acreage estimate does not represent the total for the season since some rice is planted after the first forecast is made. In past years the final official estimate has run, on the average, from 6 to 8 million acres larger than the first estimate.

The final estimate for last season placed the area harvested at 79,960,000 acres. The rice crop harvested from this acreage amounted to 2,287 million bushels, the largest in 20 years. This large crop, along with substantial wheat imports, made it possible to maintain food supplies during 1944 at satisfactory levels, following the famine conditions that prevailed during 1943 when the rice crop amounted to only 1,861 million bushels.

### RAINS DAMAGE CHILEAN RICE PLANTINGS

Heavy rainfall has damaged a portion of this season's Chilean rice acreage, which is planted principally in October. Rice production in 1945, therefore, is expected to be materially reduced. The 1944 crop of 7,460,000 bushels (218 million pounds)

represented a steady rise in production in the past 4 years. In 1941, Chile exported rice for the first time, and in 1943 exports amounted to 51 million pounds.

### DROUGHT REDUCES BOLIVIAN RICE CROP

The 1944 rice harvest in the Department of Santa Cruz, Bolivia, is almost 50 percent below normal. Rice production has been promoted especially in this Department as a step toward the goal of making Bolivia self-sufficient in rice. As a result of the Government's encouragement to increase rice production, imports of 8.7 million pounds in 1943 were considerably below average imports during the 5-year period, 1937-1941, of 21 million pounds. Of the 1943 imports of 8.7 million pounds, 6.8 million came from Chile.

### VEGETABLE OILS AND OILSEEDS

#### ARGENTINE FLAXSEED CROP SMALLEST SINCE 1918

According to the first official estimate for 1944-45, Argentine flaxseed production is only 33,128,000 bushels, the smallest crop since 1918-19 when 30,775,000 bushels were harvested. While the sown acreage was only 14 percent below that of the 2 preceding years, it is possible that a large portion of it was abandoned or, if harvested, the yield per acre was very small. Prolonged drought over some of the important producing areas and heavy frosts in July caused irreparable damage.

ARGENTINA: Flaxseed area and production,  
average 1937-1941, annual 1942-1944

AREA				
YEAR	SOWN		HAR-	PRO-
	FIRST	SECOND	VESTED	DUCTION
	ESTIMATE	ESTIMATE		
	1,000	1,000	1,000	1,000
Average	acres	acres	acres	bushels
1937-1941:	6,800:	7,039:	5,769:	58,250
1942 .....	6,091:	6,103:	5,612:	53,067
1943 .....	5,643:	5,995:	5,091:	61,926
1944 .....	4,848:	4,767:	a/4,593: b/33,128	

Argentine Ministry of Agriculture.  
a/ Third estimate. b/ First estimate.



With a carry-over estimated at about 24,000,000 bushels on December 1, 1944, plus the new crop, the total flaxseed supply of 57,000,000 bushels will be smaller than the normal exportable surplus.

## BRAZILIAN ORDER REDUCES PRICES OF COTTONSEED OIL

On December 5, 1944, the Coordinator of Economic Mobilization of Brazil issued an order reducing the prices of cottonseed oil. This reduction was largely brought about because of surplus stocks from the bumper 1943-44 cotton harvest. Crushers and exporters of cottonseed oil have been requesting a decrease in the official prices to enable Brazil to move its surplus stocks to foreign markets. For some time, prices of this commodity in Brazil have been too high to be attractive to foreign buyers.

The new maximum price for refined oil in bulk at crushing plants is 4.50 cruzeiros per kilogram (about 10.5 cents per pound). This price does not include the cost of containers nor sales taxes. Semirefined oil has now a price of 4.40 cruzeiros per kilogram (10 cents a pound) and unrefined oil 4.10 cruzeiros (9.3 cents). The newly established prices average about half a cent less per pound than the previous official prices.

## COTTON AND OTHER FIBERS

### DROUGHT PREVENTS INCREASE IN SÃO PAULO COTTON ACREAGE

The area planted to cotton in São Paulo, Brazil, for picking in 1945 (March-July) is reported to be about equal to that planted last year when a record crop of 2,150,000 to 2,200,000 bales (of 478 pounds) was produced. Drought conditions, that lasted until the middle of October, caused a delay in planting until it was too late to plant all areas intended and made necessary a considerable amount of replanting. The São Paulo Government authorized the distribution of 900,000 sacks (of 56 pounds each) of cottonseed for planting the 1944-45 crop. This represented a slight increase over the 877,293 sacks distributed last

year, when drought also caused some replanting. An increase in acreage was expected this year, largely because of the reported plans of growers to plant fewer seeds per acre.

Efforts on the part of growers to increase cotton acreage were stimulated by high cotton prices, supported by Government loan rates, which were increased on September 30, 1944, to 90 cruzeiros gross per arroba of 15 kilos (14.82 cents per pound) for type 5 cotton of 28-30 millimeters in staple length. The basic rate previously was 66 cruzeiros net (10.87 cents) with no deduction for insurance, storage, and other charges. The new rate, being on a gross basis, was equivalent to about 82 cruzeiros net (13.50 cents) after these charges were deducted at the time the loan was granted. Some of the charges were reduced by the Government about the middle of December to a total of 4 cruzeiros (0.66 cent), which in effect raised the net loan rate to 86 cruzeiros (14.16 cents). The new schedule of loan rates announced on September 30 is effective for all Brazilian cotton, whereas previous loan programs applied only to cotton delivered to designated points in the State of São Paulo.

Prices of Brazilian cotton reached a high point late in September when São Paulo type 5 cotton of 28-30 millimeters (roughly equivalent to American Middling Spot of slightly longer than 1 inch staple) was quoted on the São Paulo Merchandise Exchange at 93 cruzeiros per arroba (15.31 cents per pound). The average for October (four weekly quotations) was about 90 cruzeiros (14.82 cents) and for November, 88.5 cruzeiros (14.57 cents). A further decline to 84.5 cruzeiros (13.91 cents) was reported for December 22, and sales of cotton for export have been negligible since the cotton export program of the United States became effective on November 15, 1944. It was this price decline that prompted Brazilian cotton owners to demand a reduction in the charges for insurance, storage etc., embodied in the Government's loan program. The net loan rate of 86 cruzeiros (14.16 cents), effective since December 15, was higher than market prices during the following week and may have resulted in an



increase in applications for Government loans on cotton.

### EGYPT'S COTTON CROP LARGER THAN LAST YEAR

The second official estimate places the 1944 cotton crop in Egypt at 909,000 bales (of 478 pounds) as compared with a final estimate of 740,000 bales for 1943. Scarto (scrapped cotton) production was estimated as equivalent to some 19,500 bales additional. An earlier report indicated a planted area of 885,000 acres, against 740,000 in 1943. Egypt's cotton-acreage-restriction law in effect since January 26, 1942, was amended on August 13, 1944, to permit an increase of around 25 percent in the area planted to cotton in 1945.

### COTTON CROP IN SYRIA SLIGHTLY REDUCED

The 1944 cotton crop in Syria is estimated by private sources at about 9,200 bales (of 478 pounds) compared with 11,500 bales in 1943. Acreage planted was increased from 34,600 acres in 1943 to 39,500 in 1944, but yields were reduced by unfavorable weather conditions during the summer months and the poor quality of seeds planted this year. The "Lone Star" variety (American) is grown exclusively in Syria, except for negligible quantities of a local variety called "Paladi."

Consumption by local spinning mills in 1944 is estimated at 11,500 bales. The small quantities of cotton consumed in the manufacture of mattresses and other miscellaneous items is usually drawn from supplies of "Baladi" cotton. Exports and imports of cotton are prohibited by law. Only 1,845 bales of 1943 cotton were carried over into the new season.

### WEEKLY COTTON PRICE QUOTATIONS ON FOREIGN MARKETS

The cotton price quotations shown on the following table are received by cable in the Office of Foreign Agricultural Relations and will be published regularly, beginning with this issue.

COTTON: Price of certain foreign growths and qualities in specified markets

MARKET LOCATION, KIND AND QUALITY	DATE: 1944	PRICE EQUIVALENT PER POUND
		Cents
Alexandria (spot)	:	:
Ashmouni, F.G.F.....	12-15:	29.23
Giza 7, F.G.F.....	12-15:	32.15
Karnak, F.G.F.....	12-15:	31.73
Bombay (March 1945 futures):	:	:
Jarila .....	12-14:	16.55
Bombay (spot)	:	:
Kampala, East African ....	12-14:	36.31
Buenos Aires (spot)	:	:
Type B .....	12-9 :	14.58
Lima (spot)	:	:
Tanguis, Type 5 .....	12-18:	15.47
Recife (spot)	:	:
Mata, Type 5 .....	12-15:	12.51
Sertao, Type 5 .....	12-15:	13.50
São Paulo (spot)	:	:
São Paulo, Type 5 .....	12-15:	14.16
Torreón (spot)	:	:
Middling, 15/16" .....	12-16:	18.09

Compiled from official sources.

### FRUITS, VEGETABLES, AND NUTS

#### JAMAICA BANANA CROP RUINED

The banana trade of Jamaica has been temporarily ruined because of the hurricane of August 20, 1944. Banana production and exports had already been curtailed drastically because of damage by leaf spot and reduction of shipping facilities because of the war.

The British Government plans to provide loans up to £6 (about \$24.00) at 2.5 percent annually and grants up to £6 per acre for restoration of banana lands damaged by the hurricane. The grants are to be graduated according to percentage of damage.

The Jamaican Government will pay 4s. 10d. (about \$2.08 per bunch of nine hands instead of 3s. 9d. (about \$1.87) paid previously. Out of this new price 4d. (about 7 cents) instead of 3d. (about 5 cents) will be held for disease control, and 8d. (about 13 cents) not previously withheld, for storm insurance.

## GREEK PRODUCTION OF RAISINS AND CURRANTS LOW

No quantitative estimates on Greek raisin production have been available since the occupation of that country by the enemy during 1941. Reports reaching Allied authorities before the Germans were driven out indicated, however, that production during the period of occupation was less than half of normal. War damage, diseased vines from lack of sprays, heavy fresh consumption, and unseasonal weather have all contributed to the decreased production. Reports also indicate that a considerable portion of the raisins produced were used by the Greeks for food and were kept hidden from the occupying forces who were anxious to export as many as possible to Germany.

Greek currant production is also reported to have shown a heavy decline since the beginning of the war. Information at hand indicates that the currant crop was 55,000 tons in 1941, 49,500 tons in 1942, and 33,000 tons in 1943, as compared with an average of 129,000 tons during 1936-1940.

The possibility of Greek currants entering export channels in anything like significant quantities this marketing season appears extremely remote. The continued food shortage, political unrest, lack of internal transport and packing material, are expected to keep Greek exporters out of international markets for some time to come.

## AUSTRALIA CURRANT CROP A RECORD

Australian currant production in 1944 was the largest on record, being estimated at 28,200 tons compared with 23,700 tons during each of the 2 previous years. The production of currants has gradually increased during the 20 years since 1924 and is expected to continue this trend in post-war years. The 1944 production was 17 percent larger than the 5-year (1938-1942) average of 24,100 tons and 30 percent larger than the 10-year (1933-1942) average of 21,700 tons.

The Australian currant crop is usually disposed of in the United Kingdom and other

parts of the British Empire in competition with Greek currants. The post-war period is expected to see more Australian currants in the United Kingdom market and a corresponding decline in Greek currants. The ravages of war have left the Greek industry badly disorganized; furthermore, Greek domestic consumption most likely will be high during the next few years because of the food scarcity.

## SOUTH AFRICAN CURRANT PRODUCTION INCREASING

The production of currants in South Africa has shown a slow but steady increase during the past 20 years. The 1944 crop is estimated at 1,100 short tons as compared with 900 tons in 1943 and 1,200 tons in 1942. The estimate is 57 percent larger than the 10-year (1933-1942) average of 700 tons.

## LIVESTOCK AND ANIMAL PRODUCTS

### SMALLER HOG MARKETINGS IN PROSPECT IN CANADIAN PRAIRIE PROVINCES

Estimates presented at the 12th annual agricultural conference in Canada early in December indicated smaller hog marketings from the Prairie Provinces in 1945. Marketings in Saskatchewan are expected to reach only 83 percent of 1944 marketings, Manitoba 87 percent, and Alberta 92 percent. In contrast to the situation in the Prairie Provinces, estimates for other Provinces show an increase.

#### HOGS: Expected marketings in the Prairie Provinces, 1945

LOCATION	1945				
	AVER-	:	:	NUM-	PER-
	AGE :	1943 :	1944 :	BER :	CENTAGE
	1936-	:	:	:	OF 1944
	1940 :	:	:	:	
	Thou-	Thou-	Thou-	Thou-	Per-
	sands,	sands,	sands,	sands,	cent
Manitoba ...	322:	755:	885:	775:	87
Saskatchewan:	464:	1,409:	1,990:	1,650:	83
Alberta ....	1,055:	2,392:	2,975:	2,750:	92
	:	:	:	:	:

Official sources.



Several reasons are given for the expected reduced hog output in the Prairie Provinces, the most important one being the cash demand for feed grains in the United States and in other Canadian Provinces. For some time higher grain prices have made it more profitable for western farmers to sell the grain and to let others do the feeding. Many grain farmers in the Prairie Provinces also undertook to raise hogs as a special war effort. After the successes in Europe this summer and fall they felt that they could ease up a bit on their laborious task, as it required overtime work to carry out early morning and late evening feeding, and many of these Prairie farmers are older men.

There was also a feeling that there was no longer an absolute necessity for increasing hog shipments to Britain, since the quantity to be shipped was reduced in the fifth agreement to 900 million pounds for the 2 years 1944 and 1945, as compared with the 675 million pounds contracted for in the

single year 1943. The extension of the terms of the fifth agreement to the year 1946 and a recent request from the British Ministry of Food for at least 600 million pounds in 1945 may stimulate hog producers in the Prairie Provinces to still further efforts.

In June 1944 approximately 58 percent of the number of hogs in the whole of Canada were in the three Prairie Provinces.

**HOGS:** Number in the Prairie Provinces and all Canada, June 1, 1944, with comparisons

LOCATION	1938	1942	1943	1944
	: Thou- : sands	: Thou- : sands	: Thou- : sands	: Thou- : sands
Manitoba ..	219	708	877	624
Saskatchewan:	268	1,325	1,754	1,600
Alberta ...	707	2,093	2,338	2,279
Total ...	1,194	4,126	4,969	4,503
All Canada :	3,487	7,125	8,148	7,741

Official Sources.

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